

# **CBAS File Drop Web Portal Training**

Presented By: CDA CBAS Branch

Date: June 23, 2016

# Presenters

<b>Eden Rosales</b>	<b>Manager, CBAS Branch</b>
<b>Adam Smith</b>	<b>Data and Program Analyst, CBAS Branch</b>

# Agenda

Agenda	
Welcome and Housekeeping	Eden
Training Objectives	Eden
CBAS File Drop	Adam
Submission Process	Adam
Managing Your Account	Adam
Summary	Adam
Questions	All

# Housekeeping

- Webinar is being recorded and will be posted on the CDA website
  - [http://www.aging.ca.gov/ProgramsProviders/ADHC-CBAS/CBAS\\_Training/Default.aspx](http://www.aging.ca.gov/ProgramsProviders/ADHC-CBAS/CBAS_Training/Default.aspx)
- The PCR Form and Instructions are available on the CDA website
  - [http://www.aging.ca.gov/ProgramsProviders/ADHC-CBAS/Forms/Reporting\\_Requirements/](http://www.aging.ca.gov/ProgramsProviders/ADHC-CBAS/Forms/Reporting_Requirements/)
- Q & A at the end of webinar

# Training Objectives

- Understand the function of the CBAS File Drop Web Portal
- Obtain Instructions for uploading the Participant Characteristics Report (PCR) (CDA CBAS 293)

# **CBAS FILE DROP WEB PORTAL**

# Overview

- Internet-based
  - Works with all web browsers, including mobile devices
  - Encrypted to meet HIPAA compliance standards
- Replaces secure email process
  - Reduce risk of Protected Health Information (PHI) breach/incident
  - Timely reporting

# SUBMISSION PROCESS



# Overview

- CDA will issue usernames and temporary passwords
- CDA will notify providers via email of submission requirement
  - July 1 and January 1
- Providers will log in to the CBAS File Drop Web Portal
  - Select and upload Excel PCR file

# Overview

- CDA will analyze PCR submissions for data accuracy and quality
  - CDA staff will contact center staff for clarifications
- If PCR is approved, an email indicating that no further action is required will be generated
- If PCR is not approved, an email indicating that a need for resubmission will be generated

# Submission Required Notification

From: cbascda@aging.ca.gov  
To: Smith, Adam@CDA  
Cc: CBAS@CDA  
Subject: ACTION REQUIRED: Participant Characteristics Report (PCR) (CDA CBAS 293) Submission

Sent: Tue 6/21/2016 3:44 PM

## **ACTION REQUIRED: Participant Characteristics Report (PCR) (CDA CBAS 293) Submission**

The next PCR submission for \_Smith Test 1 is **due to CDA by 07/31/2016**.

- PCR for the enrollment period of June 1 – 30, 2015, is due to CDA by July 31. The PCR should not include any participants enrolled after June 30.
- PCR for the enrollment period of December 1 - 31, is due to CDA by January 31. The PCR should not include any participants enrolled after December 31.

The current reporting forms, training, and other reference materials are posted on the CDA website under CBAS Forms and Instructions.

Access the CDA CBAS website at:  
[www.aging.ca.gov/ProgramsProviders/ADHC-CBAS/](http://www.aging.ca.gov/ProgramsProviders/ADHC-CBAS/)

Contact CDA at:  
Email – [CBAScda@aging.ca.gov](mailto:CBAScda@aging.ca.gov)  
Phone – (916) 419-7545

**DO NOT REPLY TO THIS EMAIL. THIS IS AN AUTOMATED SERVICE AND RESPONSES WILL NOT BE MONITORED.**







# CBAS File Drop Web Portal

- Accessed via direct link
  - <https://cbasfiledrop.aging.ca.gov/>
- The CBAS forms webpage
  - [http://www.aging.ca.gov/ProgramsProviders/ADHC-CBAS/Forms/Reporting\\_Requirements/](http://www.aging.ca.gov/ProgramsProviders/ADHC-CBAS/Forms/Reporting_Requirements/)

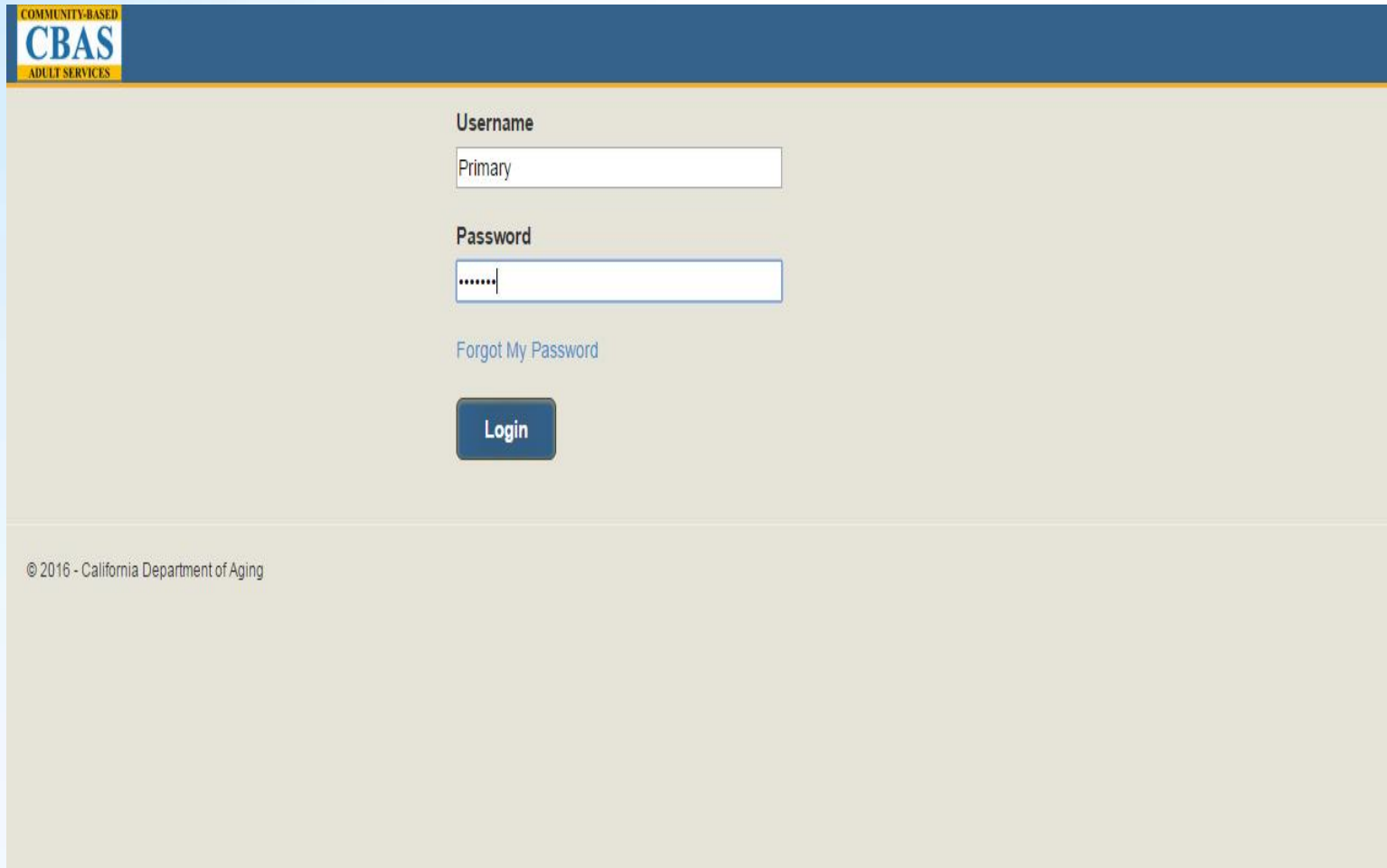
## Participant Characteristics Report (PCR) (CDA CBAS 293) (Rev 05/14)

See reporting guidelines table below.

**Submit Your PCR**

- PCR 
- PCR Training 
- Instructions 
- FAQ 
- PCR Submission Checklist 
- Secure Email Access Guide 

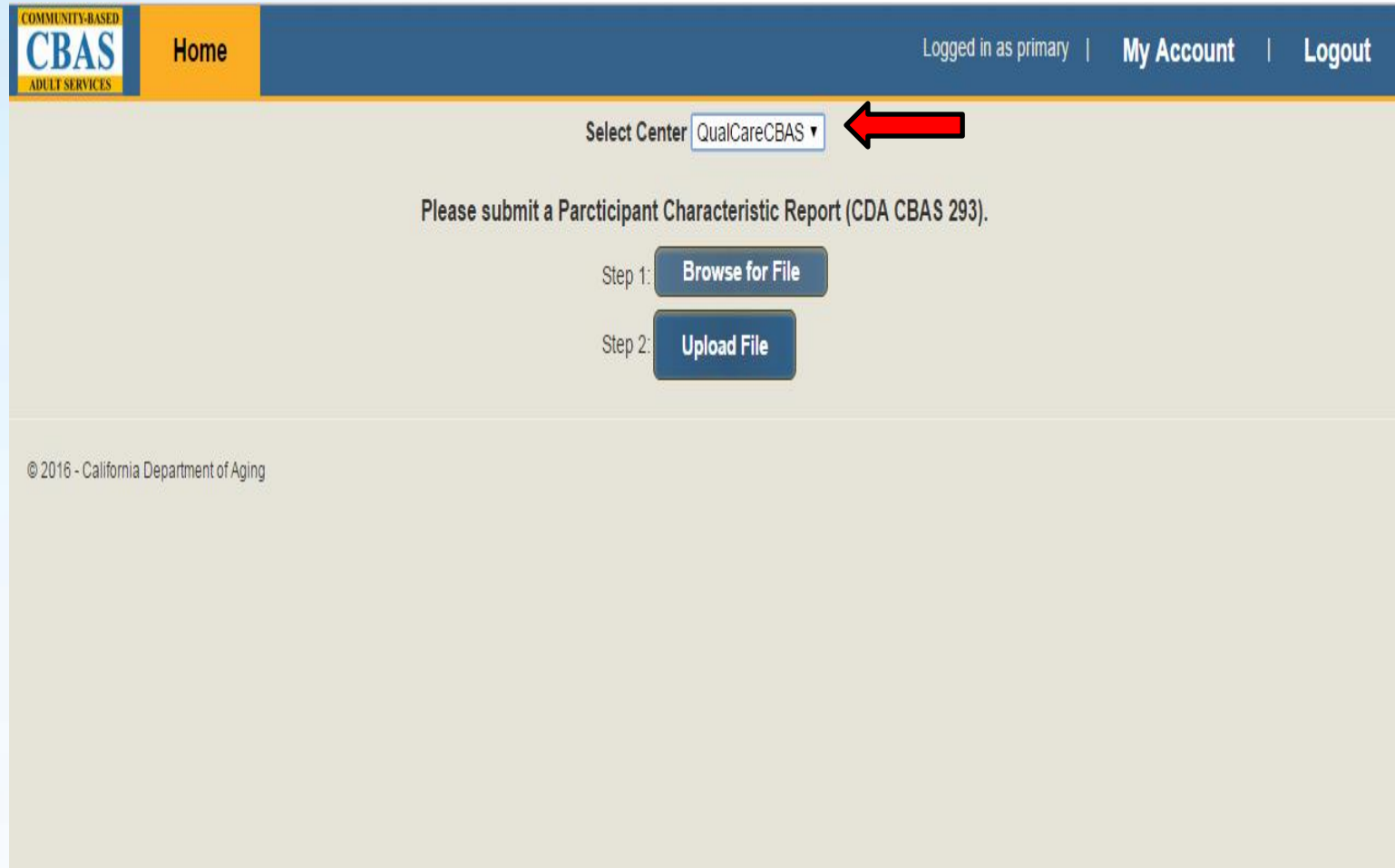
# Log Into the CBAS File Drop Web Portal



The screenshot shows the login interface for the CBAS File Drop Web Portal. At the top left, there is a logo for "COMMUNITY-BASED CBAS ADULT SERVICES". The main area contains a "Username" label above a text input field with the placeholder text "Primary". Below this is a "Password" label above a password input field with placeholder dots. A link labeled "Forgot My Password" is positioned below the password field. A blue "Login" button is centered below the password field. At the bottom left of the page, the copyright notice "© 2016 - California Department of Aging" is displayed.

- <https://cbasfiledrop.aging.ca.gov/>

# Select Center from Dropdown



The screenshot displays the user interface of the Community-Based Adult Services (CBAS) system. At the top, a blue navigation bar contains the 'COMMUNITY-BASED CBAS ADULT SERVICES' logo on the left, a 'Home' button in the center, and user information on the right: 'Logged in as primary | My Account | Logout'. Below the navigation bar, the main content area has a light beige background. It features a 'Select Center' label followed by a dropdown menu currently showing 'QualCareCBAS'. A red arrow points to this dropdown menu. Below the dropdown, the text 'Please submit a Participant Characteristic Report (CDA CBAS 293).' is displayed. Underneath this text, there are two steps: 'Step 1: Browse for File' and 'Step 2: Upload File', each with a corresponding button. At the bottom left of the main content area, the copyright notice '© 2016 - California Department of Aging' is visible.

COMMUNITY-BASED  
CBAS  
ADULT SERVICES

Home

Logged in as primary | My Account | Logout

Select Center QualCareCBAS ▼

Please submit a Participant Characteristic Report (CDA CBAS 293).

Step 1: Browse for File

Step 2: Upload File

© 2016 - California Department of Aging

# Click “Browse for File”


COMMUNITY-BASED  
**CBAS**  
ADULT SERVICES

Home

Logged in as primary | [My Account](#) | [Logout](#)

Select Center QualCareCBAS ▾

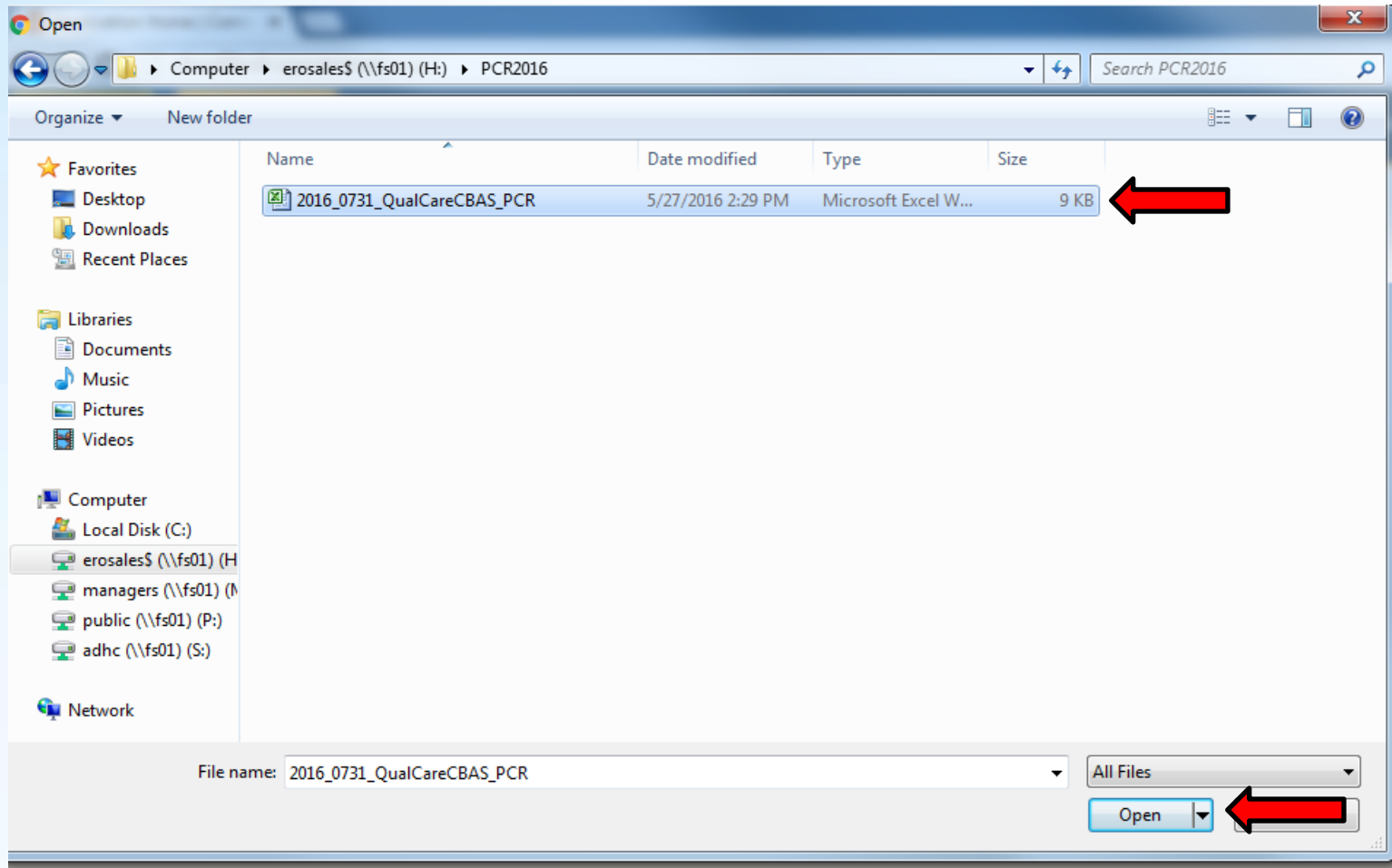
Please submit a Participant Characteristic Report (CDA CBAS 293).

Step 1: Browse for File 

Step 2: Upload File

© 2016 - California Department of Aging

# Select File





# Click “Upload File”

COMMUNITY-BASED  
**CBAS**  
ADULT SERVICES

Home

Logged in as primary | [My Account](#) | [Logout](#)

Select Center QualCareCBAS ▾


Please submit a Participant Characteristic Report (CDA CBAS 293).

Step 1: 

2016\_0731\_QualCareCBAS\_PCR.xlsx  
✕ Remove

Step 2: 

Upload File



© 2016 - California Department of Aging

# File Is Received

COMMUNITY-BASED  
**CBAS**  
ADULT SERVICES

Home

Logged in as primary | [My Account](#) | [Logout](#)

Select Center: QualCareCBAS ▾

Please submit a Participant Characteristic Report (CDA CBAS 293).

The following file has been uploaded for this request:  
Uploaded: 5/27/2016 2:32:41 PM  
Filename: 2016\_0731\_QualCareCBAS\_PCR.xlsx  
Uploading a new file will replace the last submission.

Step 1: [Browse for File](#)

Step 2: [Replace File](#)

© 2016 - California Department of Aging

Message

File uploaded successfully. Thank you for your submission.

Ok

# If You Would Like to Overwrite File

The screenshot shows the CBAS Adult Services web application interface. At the top, there is a navigation bar with the CBAS logo, a 'Home' button, and user information: 'Logged in as primary | My Account | Logout'. Below the navigation bar, there is a 'Select Center' dropdown menu currently set to 'QualCareCBAS'. The main content area displays the instruction: 'Please submit a Participant Characteristic Report (CDA CBAS 293)'. It then states: 'The following file has been uploaded for this request:'. Below this, it shows the upload details: 'Uploaded: 5/27/2016 2:32:41 PM' and 'Filename: 2016\_0731\_QualCareCBAS\_PCR.xlsx'. A note follows: 'Uploading a new file will replace the last submission.' Below this note, there are two steps: 'Step 1: Browse for File' and 'Step 2: Replace File', each with a corresponding button. At the bottom left of the page, there is a copyright notice: '© 2016 - California Department of Aging'.

COMMUNITY-BASED  
**CBAS**  
ADULT SERVICES

Home

Logged in as primary | My Account | Logout

Select Center QualCareCBAS ▼

Please submit a Participant Characteristic Report (CDA CBAS 293).

The following file has been uploaded for this request:

Uploaded: 5/27/2016 2:32:41 PM

Filename: 2016\_0731\_QualCareCBAS\_PCR.xlsx

Uploading a new file will replace the last submission.

Step 1: Browse for File

Step 2: Replace File

© 2016 - California Department of Aging

- Repeat previous steps

# Once PCR is Under Review by CDA

The screenshot shows the user interface of the CBAS (Community-Based Adult Services) system. At the top, there is a navigation bar with the CBAS logo on the left, a 'Home' button in the center, and user information on the right including 'Logged in as primary', 'My Account', and 'Logout'. Below the navigation bar, there is a 'Select Center' dropdown menu currently set to 'QualCareCBAS'. The main content area displays the message 'No PCR submission is required at this time.' At the bottom left of the main area, the copyright notice '© 2016 - California Department of Aging' is visible.

COMMUNITY-BASED  
**CBAS**  
ADULT SERVICES

Home

Logged in as primary | My Account | Logout

Select Center QualCareCBAS ▼

No PCR submission is required at this time.

© 2016 - California Department of Aging

# Approved

From: cbasda@aging.ca.gov

Sent: Tue 6/21/2016 3:46 PM

To: Smith, Adam@CDA

Cc: CBAS@CDA

Subject: Information Only: PCR Approved

## **Information Only: Your Participant Characteristics Report (PCR) (CDA CBAS 293) Has been Approved.**

No Further Action is required for \_Smith Test 1.  
Contact your CBAS Branch analyst if you have questions or concerns.

Contact CBAS Branch:

Email – [CBAScda@aging.ca.gov](mailto:CBAScda@aging.ca.gov)

Phone – (916) 419-7545

**DO NOT REPLY TO THIS EMAIL. THIS IS AN AUTOMATED SERVICE AND RESPONSES WILL NOT BE MONITORED.**

# Not Approved

From: cbascda@aging.ca.gov  
To: Smith, Adam@CDA  
Cc: CBAS@CDA  
Subject: ACTION REQUIRED: PCR Resubmission

Sent: Tue 6/21/2016 3:47 PM

**ACTION REQUIRED: Resubmit your Participant Characteristics Report (PCR) (CDA CBAS 293) with the identified errors corrected.**

Your CBAS Branch analyst has identified errors and/or inconsistencies with your recent PCR submission for \_Smith Test 1. Contact your CBAS Branch analyst if you have questions or concerns.

Contact CBAS Branch:

Email – [CBAScda@aging.ca.gov](mailto:CBAScda@aging.ca.gov)

Phone – (916) 419-7545

**DO NOT REPLY TO THIS EMAIL. THIS IS AN AUTOMATED SERVICE AND RESPONSES WILL NOT BE MONITORED.**

- Repeat previous steps to upload a revised PCR

# MANAGING YOUR ACCOUNT

# Forgot Your Password

- Resetting your password is quick and simple
- Can be done without the need to contact CDA
- Navigate to the CBAS File Drop Web Portal webpage
  - Click “Forgot My Password”
- Enter your email address that is associated with your account
- An email will be sent to you with a link to change your password



# Forgot Your Password

The screenshot shows a web interface for 'COMMUNITY-BASED CBAS ADULT SERVICES'. It features a login section with 'Username' and 'Password' fields, and a 'Forgot My Password' link. A modal window titled 'Forgot My Password' is open, containing instructions to provide an email address for password reset, an 'Email' input field, and 'Cancel' and 'Submit' buttons. The footer includes the copyright notice '© 2016 - California Department of Aging'.

COMMUNITY-BASED  
**CBAS**  
ADULT SERVICES

Username

Password

[Forgot My Password](#)

**Forgot My Password**

Please provide the email address that is associated with your account. You will then receive an email with instructions on how to reset your password.

Email

**Cancel** **Submit**

© 2016 - California Department of Aging

# Forgot Your Password

From: do\_not\_reply@aging.ca.gov  
To: Smith, Adam@CDA  
Cc:  
Subject: Reset Your Password

Sent: Wed 6/15/2016 4:00 PM

Hi [adam.smith@aging.ca.gov](mailto:adam.smith@aging.ca.gov),

A request to reset your password has been received. This request is only valid for 30 minutes.

[Reset Password](#)

If you ignore this message, your password will not be changed.

If you did not request a password reset, please [let us know](#).

# Changing Your Password

- If the need arises, changing your password is quick and simple!
- Can be done without the need to contact CDA
- Log into the CBAS File Drop Web Portal
  - Go to My Account
  - Click Change password
  - Follow the on-screen guidelines for password formats

# Changing Your Password

The screenshot shows a web interface for 'COMMUNITY-BASED CBAS ADULT SERVICES'. The top navigation bar includes 'Home', 'Logged in as asmith', 'My Account', and 'Logout'. A 'Change Password' button is located in the top right area. Below this, a modal form titled 'Change Password' is displayed. The form contains three input fields: 'Old Password', 'New Password', and 'Confirm New Password'. At the bottom of the form are 'Cancel' and 'Submit' buttons. The footer of the page shows the copyright '© 2016 - California Department of Aging'.

COMMUNITY-BASED  
**CBAS**  
ADULT SERVICES

Home

Logged in as asmith

My Account

Logout

Change Password

© 2016 - California Department of Aging

**Change Password**

Old Password

New Password

Confirm New Password

Cancel Submit

# Removing or Adding a New User

- Complete the CBAS File Drop User Request Form
  - [http://www.aging.ca.gov/ProgramsProviders/ADHC-CBAS/Forms/Reporting\\_Requirements/](http://www.aging.ca.gov/ProgramsProviders/ADHC-CBAS/Forms/Reporting_Requirements/)
- Submit to CBAS Branch general email
  - [cbascda@aging.ca.gov](mailto:cbascda@aging.ca.gov)
- CDA will confirm once changes have been made

# Removing or Adding a New User



## CBAS FILE DROP WEB PORTAL ACCOUNT ACTION REQUEST



This form is used to add, change, or disable user access to the CBAS File Drop Web Portal.

### **INSTRUCTIONS**

1. Indicate action requested by checking the appropriate box.
2. Complete Section A to identify the user.
  - a. Note: Each user must have a unique email address.
3. If a change to an existing user account is being requested, complete Section B.

Email the form to the CDA CBAS Branch at: [CBASCDAA@aging.ca.gov](mailto:CBASCDAA@aging.ca.gov).

☐ New User Account    ☐ Change to Existing User Account    ☐ Disable User Account

SECTION A. User Information	
User Name:	Click here to enter text.
User Title:	Click here to enter text.
Email address:	Click here to enter text.
Center Name:	Click here to enter text.
NPI:	Click here to enter text.

SECTION B. Changes to Existing Accounts	
User Name:	Click here to enter text.
Email address:	Click here to enter text.

ACCOUNT ACTION REQUEST (Rev 07/16)

# Summary

- Internet-based
- The CBAS File Drop Web Portal allows for secure submission
  - Save providers and CDA staff time
  - Avoid PHI breaches/incidents

# Q & A





# CDA Contact Information

CDA on the Web	<a href="http://www.aging.ca.gov">www.aging.ca.gov</a>
Addresses	California Department of Aging CBAS Branch 1300 National Drive, Suite 200 Sacramento, CA 95834  <a href="mailto:cbascda@aging.ca.gov">cbascda@aging.ca.gov</a>
Phone	(916) 419-7545

**Thanks for Participating!**